DOCUMENT RESUME

ED 438 747 HE 032 633

TITLE	Points of Distinction: A Guidebook for Planning & Evaluating Quality Outreach.
INSTITUTION	Michigan State Univ., East Lansing.
PUB DATE	1996-00-00
NOTE	51p.
PUB TYPE	Guides - Non-Classroom (055)
EDRS PRICE	MF01/PC03 Plus Postage.
DESCRIPTORS	College Faculty; Community Involvement; Delivery Systems; Educational Resources; *Evaluation Criteria; *Faculty Development; Higher Education; Linking Agents; Organizational Objectives; *Outreach Programs; Participative Decision Making; *Planning; *School Community Programs; State Universities
IDENTIFIERS	Community Service; *Michigan State University

ABSTRACT

This guidebook, prepared by a faculty committee at Michigan State University (MSU) in 1995-96, is intended to encourage discussion of quality outreach among faculty, staff, administrators, and university collaborators. Its specific purpose is to develop an understanding of what constitutes quality outreach, to enhance unit-level planning for outreach, and to communicate both internally and externally about outreach activities. The book is organized in three sections: (1) academic unit planning and evaluation (context for outreach planning and evaluation, planning unit outreach, and evaluating quality outreach); (2) documenting and evaluating individual faculty (criteria for measuring quality outreach, merit salary increases and promotion/tenure decisions, reporting faculty excellence in outreach, and faculty development in outreach); and (3) evaluating quality outreach, including a four-dimensional matrix that examines significance, context, scholarship, and impact. Seven appendixes provide various tools for defining, planning, and evaluation: a description of the MSU model; outlines for unit planning and priority setting; rewarding quality outreach; evaluating unit outreach; developing faculty outreach portfolios; evaluating individual outreach; and resource materials. Also appended is a glossary. (Contains 18 resources.) (CH)

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A Guidebook for Planning & Evaluating Quality Outreach

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Revised October 1996

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PLANNING & EVALUATING QUALITY OUTREACH

A unit chair is receiving increasing numbers of requests from constituents for faculty consulting, technical assistance, or needs assessment. She wonders how best to respond, lamenting that a unit cannot do everything with available resources and expertise. The chair asks, "How can I establish priorities that balance the unit's commitment to excellence across the full breadth of the mission?"

A new, untenured faculty member is interested in working with a particular client or constituency group, but in negotiating workload with the unit chair asks pointedly, "If I engage in outreach activities, how will I be rewarded or receive recognition? What effect will my outreach effort have on consideration for tenure and promotion? Are there guidelines for how I should document my efforts?"

A dean, interested in exploring possibilities for offering off-campus degree programs through distance education technologies, wonders, "How will I know if the students' learning experiences are comparable to those in on-campus programs?"

OUTREACH PROJECT EXAMPLE

Applied and Interdisciplinary Research: Science & Technology

The Center for Microbial Ecology draws on the expertise of faculty from more than twelve academic departments to conduct basic and applied research aimed at understanding the influence of microbial processes on the environment. The Center works closely with corporations and regulatory agencies to develop and implement biological technologies for the cleanup of polluted sites and for environmentally sound treatment of waste streams. One collaboration has resulted in new interdisciplinary research programs focused on innovative hazardous waste management technologies.

Practically speaking, outreach may take many forms. Outreach extends the university's *research* capacity to nonacademic audiences through such activities as applied research and technical assistance, demonstration projects, evaluation of ongoing programs, technology transfer, policy analysis, and consulting undertaken in conjunction with the unit's programs. It also extends campus *instructional* capacity through credit/noncredit courses, seminars, workshops, exhibits, and performances to off-campus or non-traditional audiences.

Outreach is a fundamental part of the mission of American Higher Education. As universities and colleges pursue excellence across their missions, and thoughtfully reflect how best to serve society in the twenty-first century, both units and individual faculty members will be expected to articulate and assess their outreach agendas. This guidebook is presented to assist the university community in planning, monitoring, and evaluating its outreach efforts and in integrating them with the total mission of the university.

The Provost's Committee on University Outreach defines outreach as

. . . a form of scholarship that cuts across teaching, research, and service. It involves generating, transmitting, applying, and preserving knowledge for the direct benefit of external audiences in ways that are consistent with university and unit missions (University outreach at Michigan State University: Extending knowledge to serve society, October 1993, p. 1).

Although outreach is an integral part of a university's mission, the way outreach projects are defined, designed, and valued cannot be uniform across all units. The lack of adaptable models for planning, measuring, and evaluating outreach has created the need for this guidebook. We have chosen the term "guidebook" advisedly, hoping that the questions, planning tools, and suggestions it contains can help guide academic units in their attempt to adopt workable definitions and assessments of outreach specific to their own needs, areas of expertise, and mission.

Values Embedded in the Guidebook

The underlying values embedded in this document need to be identified and brought to the attention of users so that if their own values differ radically from those of the committee, those differences could form a starting point in adapting the document for their use. "Values" reflected in these ideas may be widely held positions in the real and ideal practices of university outreach in public-minded colleges and universities. However, for the sake of full disclosure, the committee highlights the following value positions undergirding this document.

1 Mutuality and Partnering. A given for university outreach is mutuality of purpose or two-way exchange. Both the university and its stakeholders collaborate in the learning or discovery process.

Both give and take, both are enriched by the process. It is therefore expected that all groups share in the design, operation, and evaluation of outreach projects. It also means that although university interests may differ from those of partner organizations and individuals, there must be some match in needs, intents, or interests for the project to take place. If all groups are considered active and inter-active learners, then outcomes should be evaluated in relation to the individual and collective interests of those involved.

2 Equity. One can also readily state that although those collaborating on a project bring varying assets and strengths to the relationship, all groups share an underlying equity of status. University representatives are not superior because of their degrees or skills. Likewise, stakeholder representatives do not merit higher status because of their background, life experience, or circumstances. Rather, both university representatives and stakeholder representatives bring to the outreach project a rich information and experiential base that aids in the learning process. Active learning requires that all partners enter into the process, that contributions are respected, and that the evolving outcomes are enriched by the quality of interaction. Thus, equality in relationships fosters positive outcomes.

3 Developmental Processes. A common thread throughout the document is appreciation for developmental processes that evolve, grow, and progress over time. Whether in the relationships between partners, the sophistication and maturity of programming, the stage of research, the level of independence of participants, or the sustainability of endeavors—all evoke a longer term, more systematic placement of outreach activities in the context of development. Activities that are developmentally appropriate and planned in some conscious sequence of progression are to be valued.

4 Capacity Building. The guidebook reinforces the expectation that an important role for a university is to develop human, institutional, or social capital; that is, to create abilities for higher order functioning, independence, and creative expansion of ideas, not just to fix a problem or provide a service. Embedded in concepts of quality outreach, therefore, is appreciation for appropriate individualization of activities, thoughtful involvement of stakeholders in the program design and execution, and participatory evaluation or reflection that assures that those experiencing the program are better equipped for future, independent action.

5 "Communityness." An ultimate goal of university outreach is to develop "communities," whether communities of place, of profession or of interest. In our fast-paced and information-rich lives, people need to be able to identify with each other and with movements or sets of ideas. Being part of a community provides a sense of identity and mutually satisfying commitments. Seeing oneself as part of a larger system helps to create a sense of purpose and activates change. University outreach can help people coalesce around interests or issues for either immediate or long-term attention to change processes.

OUTREACH PROJECT EXAMPLE

Public Policy Analysis: Legislative Affairs

A Joint effort of the College of Social Science and MSU-Extension seek to link decision makers in the state legislature with university policy expertise. This Legislative Leadership Program includes an initial institute for recently elected legislators with follow up programs of mutual interest.

6 Cross-Disciplinary Approaches. Although a multi-disciplinary or cross-disciplinary approach is not explicitly expected in every outreach project, an underlying openness to multiple inputs is expected. Often in practical, community-based problem solving and action learning projects, expertise from multiple disciplines and multiple professional perspectives is needed and valued. Therefore, an underlying value reflected in this document is sensitivity and competence to work in teams, ability to integrate inputs from various sources, and recognition and use of cross-disciplinary resources as required.

7 Scholarship and Pragmatism. The outreach model articulated in this publication balances scholarship with pragmatism. University outreach is both a scholarly and a pragmatic endeavor, one that adds to our knowledge base in a scholarly manner but also creates practical or useful results for people, institutions or communities. A value is placed on planned-action, reasoned-participation, outcomes-oriented programming that provides benefit to those involved. But of equal importance is the scholarly contribution of the outreach involvement. University outreach must be intellectually stimulating, must generate or add to the knowledge of the field and must meet university standards for scholarship consistent with expectations in other aspects of the university mission. The combination of pragmatism and scholarship is always characteristic of quality university outreach. The combination may not always be present in the activities of disciplinary scholars or individuals dedicated to improvement of community life.

8 Integrity. All endeavors should be expected to maintain the highest standards of ethics, integrity and moral sensitivity. A university has a responsibility to function at the highest level of community and scholarly standards of behavior and to take the responsibility to foresee and take all reasonable precautions to prevent unnecessary risks to those involved.

Purposes of the Guidebook

This guidebook seeks to

- encourage discussion about what quality outreach means among faculty, staff, administrators, and university collaborators;
- develop a common understanding of what constitutes quality outreach, and the language to describe it;
- assist units in articulating definitions and expectations for outreach consistent with their mission, values, and context;
- enhance unit-level planning, resource allocation, assessment, and accountability;
- suggest ways of rewarding outreach achievements in tenure, promotion, and annual merit salary decisions;
- suggest to faculty alternative ideas for documenting and reporting accomplishments in outreach; and
- provide an aid for units in communicating, both internally and externally, about their outreach activities and their impact.

Organization of the Guidebook

The guidebook is divided into three sections: Academic Unit Planning and Evaluating, Individual Faculty Planning and Evaluating, and Project Evaluation. The appendix contains helpful tools for use by both units and faculty such as definitions, planning exercises, suggestions for developing a faculty portfolio, and a list of resource materials.

The planning suggestions in this guidebook can serve as an aid to unit chairs and deans for planning not only their outreach agendas but their on-campus teaching and research agendas as well. In fact, given the definition of outreach as scholarship that cuts across all the mission dimensions of the university (teaching, research, and service), planning for outreach implies planning the unit's entire scholarly endeavor. The planning suggestions here have been designed to fit with other efforts at a university, particularly institutional academic program planning and review, promotion and tenure and annual faculty review, and various quantitative data collections.

The evaluation suggestions are based on four *assumptions.* First, both qualitative and quantitative indicators are essential for evaluating the quality of outreach activities. Second, evaluation is useful at all stages of the process—for planning purposes; for formative and developmental purposes; and for summative, outcomes purposes. Third, evaluation is necessary at both the unit level and the individual level, and the documentation for each will be of necessity somewhat different. Finally, documentation must be tailored to each activity's purposes.

The project evaluation matrix revolves around four *dimensions:* significance, context, scholarship and impact. Each dimension includes a number of components, with suggested questions and qualitative and quantitative indicators.

Using the Guidebook

Section I suggests a process for planning and evaluating the outreach enterprise at the *unit* level. Specific tools to aid in the unit planning process are found in Tools A, B, C, and D of the appendix. Section II proposes criteria for planning, documenting and evaluating *individual faculty* outreach efforts. Tools E and F provide a list of elements that could be included in a faculty outreach portfolio and aids for faculty assessment. Section III focuses on evaluating the quality of an outreach *project,* displayed in a matrix based on four dimensions of quality outreach, along with sample questions and indicators for documenting and assessing them. Additional resources are listed in Tool G.

Deans can use this guidebook to:

1. Incorporate outreach into the college mission.
2. Establish quality measures for the comparative evaluation of unit and faculty outreach accomplishments.
3. Demonstrate that scholarly achievement can be planned, documented, and evaluated in the area of outreach.
4. Assist the college in planning, ranking, and reporting its quality outreach efforts.
5. Discriminate among competitive outreach funding requests on the basis of their potential to result in quality efforts.

Unit Chairs and Directors can use this guidebook to:

1. Engage the unit's faculty and/or faculty advisory committee in discussing the unit's values and expectations for outreach. Such a discussion could include reflection on the definition of outreach as scholarship and on its relationship to the teaching, research, and service missions of the unit. (See Section I and Tool A.)
2. Develop a plan that prioritizes the unit's outreach goals and initiatives. (See Tool B.)
3. Select appropriate criteria for evaluating the quantity and quality of outreach projects. The "Matrix for Evaluating Quality Outreach" presented later in this guidebook may be adapted to fit the unit's values and priorities. (See Section III and Tool D.)
4. Set guidelines to assist in determining faculty workload, promotion and tenure criteria, and merit salary increases. (See Sections II and III and Tool C.)
5. Work with individual faculty in developing a career and work plan, utilizing the recommendations in this guidebook for developing a faculty outreach portfolio and evaluating individual outreach efforts. (See Section II and Tools E and F.)

Individual Faculty Members can use this guidebook to:

1. Work with the unit chair or director to develop a career and work plan, utilizing the recommendations in this guidebook for the individual. (See Section II and Tool F.)
2. Develop evaluation criteria and indicators by consulting the "Matrix for Evaluating Quality Outreach" (see Section III) at three stages in the outreach project:
   - planning; for example, when designing the evaluation component for a proposal;
   - mid-point in the activity, in assessing the progress and direction of the projects as formative, developmental evaluation;
   - at the end of the activity, as summative, outcomes evaluation.
3. Document outreach involvement by utilizing the recommendations for developing a faculty outreach portfolio. (See Tool E.)

I THE ACADEMIC UNIT: PLANNING & EVALUATING THE OUTREACH ENTERPRISE

If outreach is to be well integrated into the lives of faculty, colleges and other major administrative/academic units need to have meaningful processes and procedures for identifying outreach needs or opportunities, setting priorities, and providing support, incentives, and rewards. While these processes and their results will vary depending on the governance style of the individual units, nevertheless, shared understandings are desirable to maximize productivity and support, particularly in decisions to allocate human and financial resources to outreach initiatives.

Context for Outreach Planning and Evaluation

Recommendation 3 of the *Report of the Provost's Committee on University Outreach* states that "Outreach planning at Michigan State University should involve multiple parties in an open, continuous, and interactive dialogue. This planning process should be undertaken with the understanding that primary responsibility for outreach resides at the unit level" (*University outreach at Michigan State University: Extending Knowledge to Serve Society*, October 1993 p.16).

It is recognized that colleges and other major administrative units have varying histories and contexts associated with outreach activities. These variations mean that different procedures and possibilities are relevant for particular units. Each unit needs to consider its unique context, climate, resources, and priorities in fashioning realistic operational supports.

Whether the unit is undertaking new directions, evaluating and augmenting existing outreach initiatives, or realigning resources, a set of conditions or unit guidelines concerning priorities and possibilities aids in those decisions. The following three considerations will affect unit operations and provide the context for planning and evaluation.

1 Formality of Expectations

Each unit establishes a climate concerning the degree to which outreach is formally discussed and planned along with other activities of the unit. Some units have formal, written expectations, while others treat outreach rather informally. In some units, outreach plans are discussed annually or periodically and the portfolio of outreach projects is reviewed periodically to determine whether the activities conform to unit expectations and demands. Units also vary in their overall level of effort and in the degree to which faculty load and expectations for involvement in outreach are articulated. Based on these expectations, units determine the extent to

which rewards are applied, whether consciously or incidentally. All of these elements reflect the overall relevance and importance of outreach to the unit. Outreach can be viewed on a continuum from planned and systematic, to ad hoc or random. The starting point from which the unit enters the process affects the nature of the procedures it needs to undertake a planning effort.

2 Locus of Control

Who determines what projects are to be undertaken and who should be involved in them? Are decisions about outreach centralized within the unit or do individual faculty members determine their own agendas? Are faculty hired or assigned with specific contributions to outreach in mind? How flexible are commitments? Do external stakeholders have long-standing expectations to which the unit must respond, or does the outreach agenda vary constantly? To what extent does the unit feel accountable for the delivery of its outreach capabilities? The level of demand for outreach places pressures on units that determines, to some extent, the degree of flexibility for them to change direction or envision alternatives.

3 Resource Allocations

The amount and consistency of available resources can influence the role and importance of outreach in a unit. Units with relatively stable resource flows can plan more systematically and over a longer term. Collaborative commitments can be considered another form of resource. These arrangements can influence institutional decision making. When community groups or industries cooperate in the delivery of outreach activities or form interdependent relationships with academic units, the commitments can leverage unit resources and influence outreach plans.

Planning Unit Outreach

As a first step in developing a collective plan for outreach, the unit may wish to engage in a discussion of its values and expectations. A beginning point for that discussion may be a definition of outreach—outreach as scholarship, its relationship to the missions of the unit, its benefits for all stakeholders. Tool A contains a definition developed by the Provost's Committee on University Outreach along with some observations on outreach as scholarship and a description of the relationship of outreach to teaching, research, and service. Other resource materials that may aid in this conversation are listed in Tool G.

The second step is designing or adopting a planning process. *The Unit Planning and Priority Setting Exercise* (Tool B) can help units to develop a shared vision of outreach possibilities, describe and rate the importance and performance of current projects, and choose outreach priorities for the future.

I

The third step is, of course, the actual planning. The unit's outreach planning can be a complement to an institution's annual academic program planning and review process. Plans may also be developed in conjunction with the overall strategic plan of the unit or particular plans related to disciplinary or accreditation objectives. Other university-wide data collection tools such as unit and faculty effort and accomplishments data can serve as source materials for identifying resources, current initiatives, and output measures.

OUTREACH PROJECT EXAMPLES

Off Campus Credit Instruction: Social Work *The first of its kind to be accredited by the Commission on Social Work Education, The School of Social Work offers a full MSW degree program in northern Michigan using two-way interactive instructional technology. Instructional leadership is provided by faculty of the School assisted by on-site instructors, and newly developed network of public and private agencies in the Upper Peninsula. The program and its cohort is also linked to a similar site in another off-campus location and on the MSU campus.*

International Development: Businesses and Communities *The International Business Center provides assistance to small- and medium-sized companies seeking to expand into foreign markets through group training, employing expert systems, and providing valuable advice about foreign investment and the potential for their products in foreign markets. The Michigan International Development Education Outreach Network (MIDEON) partners 22 institutions to expand awareness of international issues and their impact on local education and business.*

Evaluating Quality Outreach

Once a unit has articulated its basic priorities and developed an outreach plan, it should develop indicators for assessing the quality of its initiatives. The "Matrix for Evaluating Quality Outreach" found in Section III of this guidebook identifies dimensions, components, and indicators that may be used to assess and document specific projects or activities. A unit may wish to modify these criteria to reflect its own values and interests. The following questions may suggest areas for reflection when selecting, adapting, or modifying the indicators:

1. Is the unit concerned about access, especially for specific constituencies, target groups, or geographic locations?

2. Has the unit articulated a focus area, such as a disciplinary or societal issue (e.g., aging, economic development, genetic counseling)? These unit level concerns can be used as markers in evaluating outreach contributions.

3. University-based outreach should involve scholarly dimensions. Are there specific forms of scholarship of high priority to the unit (e.g., publishing, training, teaching, applied research, policy development, professionalization of a field)? These forms of scholarship can be given special attention in the unit's criteria for evaluating quality outreach.

4. Faculty involved in outreach maintain various expectations and standards when working with off-campus groups. Issues such as sustainability and capacity building seem to be of common concern. Additionally, units may have expectations or assumptions about other qualities of its outreach relationships with stakeholders. For example, they should be participatory, developmental, collaborative and mutually beneficial. These conditions can be translated into criteria for judging outreach.

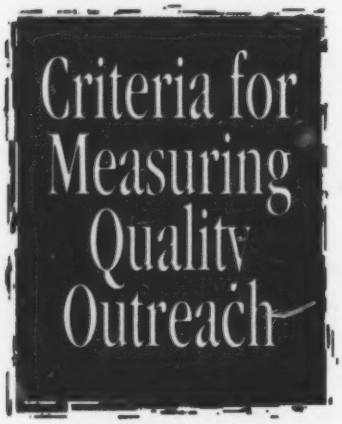
5. Other components of interest to the unit should be described and used as a reference in evaluating the quantity and the quality of outreach. The sample questions and indicators suggested in the Matrix in Section III can be modified to reflect unit-level practice. Tools C and D in the Appendix can be used to promote discussion on rewarding and evaluation quality outreach.

Following selection of appropriate criteria for evaluating the quantity and quality of outreach, the unit may set guidelines to assist in decisions about load, promotion and tenure, and merit salary increases. Units may find it useful to create reporting systems and operational guidelines to aid faculty in determining their involvement in outreach initiatives. Section II provides guidelines for evaluating and documenting faculty outreach contributions.

II THE INDIVIDUAL: PLANNING & EVALUATING FACULTY OUTREACH EFFORTS

When faculty members approach the task of developing or modifying their shared vision and strategies for satisfying the range of obligations related to the unit mission, including outreach, questions concerning faculty talents, career stage, and interests play a key role in the profile that results at any given time. For some faculty members outreach projects represent a major focus and opportunity for scholarly advancement, while others may not participate in this aspect of the mission at all. Some faculty may have been hired to fill positions with significant outreach expectations. Others will assume outreach responsibilities as opportunities present themselves in the course of their academic careers.

Although the chair or director may understand that certain faculty members in the unit have significant outreach obligations and are expected to demonstrate their scholarly excellence through them, it is critical that this understanding be shared by all faculty involved in the peer evaluation process and that there be a common understanding of the relative value of the outreach activities to be performed. Without this common understanding, the culture of many units may undervalue or disregard the outreach scholarship of individual faculty members. Likewise, faculty who participate in outreach must understand the relative value placed on the activities by their unit, college and university. Quality outreach, even as defined and documented in this guidebook, may not reap expected rewards if those involved have ignored the priorities and peer evaluation criteria of their unit, college and university.



Peer evaluation committees are accustomed to evaluating scholarly research; however, informed evaluation of outreach scholarship may have to take into account a broader array of input (e.g., from groups and individuals directly affected by the activities), a broader array of outputs (e.g., forms of documentation other than peer-reviewed publications), and a broader array of qualities (e.g., evaluation of the process designed to obtain the outcomes).

On one hand, evaluation of outreach will rely on *input* from external, non-peer, stakeholder groups for evaluative commentary on the significance, appropriateness, and impact of the project. These

evaluations must be considered in the overall measure of the quality of an individual's specific contribution to the outreach project. The criteria should help individuals and units to interpret appropriately external critiques of the outreach project.

On the other hand, the scholarly component of the project, that which legitimizes the outreach effort as a university activity, accessible to peer review, remains the province of the scholarly community in much the same way that the scholarly quality of more traditional scholarship is evaluated. The difficulty here may be twofold: not only are peers unaccustomed to evaluating scholarship within an outreach context, but also the documents, or *outputs,* for review may be presented in unfamiliar forms. Traditionally, research is judged to be quality if it has been accepted in peer-reviewed publications; usually the acceptability of one's scholarship by external peers is by itself sufficient documentation of quality.

This traditional form of documentation is also characterized by its transferability to other locations and times. Because outreach is often a *process* with one or more activities rather than a single product, the quality of outreach scholarship may require alternate forms of documentation, such as impact on the community, the quality of any resulting change, increased use of facilities for desired ends or the quality of materials produced for public consumption. If the scholarly component of the project is not obvious, the individual researcher may present introductory commentary to the peer review panel that explains the scholarly advances associated with project planning, design, implementation, impact, and evaluation. Whatever the case may be, the appropriate reviewers for the scholarly component of an outreach project are one's peers. But peer review panels must be prepared to consider a broader array of criteria and alternate forms of documentation when evaluating outreach scholarship.

Unit criteria will be of significant assistance to faculty when *planning* their role in outreach activities. Unit guidelines should encourage more conscientious planning, qualitative improvement in the activity, and modifications in project direction to better fit with unit priorities. This will result in a far greater likelihood that the faculty member can document the level of quality of the activity and receive proper credit for the work in the peer evaluation process.

OUTREACH PROJECT EXAMPLE

Broad-Service Partnerships and Evaluation Studies: Health and Human Services

As part of their broad-service relationship with two health care agencies, university researchers have undertaken responsibility for evaluating teen health centers and for assessing the effects of an innovative health insurance program on enrollees' health behaviors, among other projects.

Merit Salary Increases & Promotion/Tenure Decisions

A necessary outgrowth of the role and relative value of outreach in a unit will be the creation of unit guidelines to reward individuals for quality outreach in merit salary increases and promotion/tenure decisions. (See Tool C for suggestions on rewarding an individual's outreach accomplishments.) As guidelines are being developed, classifying an outreach activity as research, teaching, service, or a combination of the three may be less important than determining the extent to which the project promotes or maintains the reputation of the individual as a recognized expert in his or her field. This consideration is especially relevant for junior faculty. In many units, because outreach and scholarship are viewed as different activities, junior faculty are often advised to avoid involvement with outreach until their careers are secure and their reputations as scholars established. As soon as units identify specific outreach activities in which significant scholarly activity can be planned, implemented, assessed and recognized—in research, teaching, service, or a combination—then faculty at early stages of their careers can be encouraged to engage in this form of scholarship.

In offering this view, we recognize that universities are becoming more complex and are requiring more and more of their faculty to excel in a variety of areas. Only rarely will a faculty member demonstrate scholarly excellence at equal levels in all these areas. Nevertheless, excellence in outreach should be recognized and rewarded if it is valued. We also recognize that the ways in which faculty members in various professions and disciplines disseminate and document their scholarship and assign relative values to various forms of scholarship cannot be standardized across the university.

Reporting Faculty Excellence in Outreach

As with all accomplishments worthy of consideration, faculty must be able to present and represent their outreach efforts in useful ways. Universities, for example, request data on faculty productivity, both for planning and for reporting to state legislatures. While *quantitative* data may reflect success in meeting target mission obligations, such as stakeholder responses, or resource commitment, most quantitative categories may be more useful if their definition includes *qualitative* factors. For example "number of off-campus courses offered" could become "number of off-campus courses offered with syllabus modifications to accommodate the non-traditional student." Similarly, "number of programs offered" could become "number of new or modified programs offered where current scholarship is being applied or advanced."

For faculty reporting outreach activity as part of a peer review process, units should:

1 require completion of locally designed standardized forms to allow for comparative evaluations across faculty and across one faculty member's career over time. Forms should relate faculty accomplishment to the outreach mission and evaluation criteria of the unit, provide guidance on the relative value of the activity compared to others related to the unit mission, allow for both quantitative and qualitative measures of quality assessment, request evidence for the scholarly component of the activity, and ask faculty to clarify their individual role in collaborative outreach projects.

2 differentiate among peer review processes (e.g., honorary awards, applications for positions, annual merit salary increases, tenure, promotion) and the amount and nature of the documentation required for making informed and equitable decisions. For example, while a comprehensive portfolio, detailing an individual's outreach contributions over the years, may be suitable for a promotion decision to professor, the annual merit salary review process may require far less thorough description.

Faculty Development in Outreach

As the university becomes more responsive to the value of outreach in its professional life and adopts ways of valuing and measuring contributions in this area, unit level administrators should be alert to opportunities for programmatic and faculty development in outreach. While some faculty are hired because of their strengths in outreach, others may become more receptive to outreach and more skilled in that arena as they mature as professors. When the university modifies its vocabulary and conceptual frame, the full and dedicated participation of faculty should increase.

III THE PROJECT: EVALUATING QUALITY OUTREACH

The project is the starting point for evaluating the outreach contributions of individuals or units. Projects range from complex, multi-partnered interventions to new off-campus course offerings to one-time presentations for non-university audiences. Projects are planned, approved, implemented, and assessed. They may have distinct components that are integral parts of the larger design which one may plan, approve, implement, and assess but which do not merit "project" status themselves. Projects can succeed or fail, be good or bad; the ultimate value of the projects forms the basis of any assessment of individual or unit outreach performance.

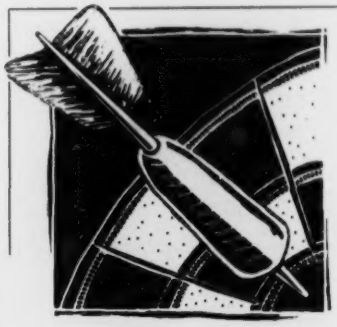
As a professional university responsibility, an outreach project is assessed according to commonly held values and familiar measures that are applied to teaching, research, and service. These, as well as additional measures and values specific to the success of an outreach project, are suggested in the matrix presented here.

OUTREACH PROJECT EXAMPLE

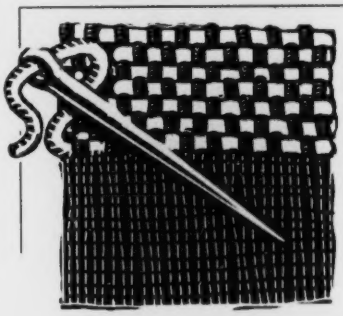
Arts Education: Arts and Culture

In conjunction with the Music Department, the Wharton Center for the Performing Arts has developed the Wharton Partners program to incorporate arts education into traditional school curriculum. Through collaboration of student artists and classroom teachers, the Wharton Partners program demonstrates how increased awareness and improved knowledge of the arts can contribute to a student's ability to think creatively and critically while improving problem-solving skills.

FOUR DIMENSIONS OF QUALITY OUTREACH



Significance



Context

Scholarship

Impact

THE MATRIX

Purpose. The following matrix is offered as a tool for the evaluation of an outreach project, be it short term or long term, instructional or non-instructional. The matrix may also serve as a planning guide for those initiating outreach activities. For those interested in assessing the outreach record of units or individuals in addition to projects, the appendix of the guidebook includes specific assessment tools for these tasks. For each, however, this matrix serves as the evaluation tool for the projects that are fundamental to those assessments.

Organization. The matrix suggests one way to think about evaluating outreach. The "Dimensions" (significance, context, scholarship, and impact) reflect four fundamental characteristics of any outreach project in higher education. Commonly held outreach values drive the headings under "Components." The "Sample Questions" guide users in the kinds of practical concerns associated with the outreach values in the components. The "Indicators" list possible ways to demonstrate and document quality in each area. We recommend that users understand the categories and questions as prompts and refrain from exercising taxonomic rigor with the matrix! Values inherent in specific components frequently overlap dimensions; often, sample questions can be rephrased and located elsewhere.

Customizing. The matrix is neither exhaustive nor prescriptive. It provides guidance in the evaluation of four dimensions of outreach undertaken by higher education: its significance, its context, its base in scholarship, and the outcomes it generates. Users are encouraged to add and eliminate

MATRIX FOR EVALUATING QUALITY OUTREACH

Title of Project: _____

Description/Purpose: _____

Stakeholders: _____

DIMENSION	COMPONENTS	SAMPLE QUESTIONS
Significance	Importance of Issue/ Opportunity to be Addressed	■ How serious are the issues to the scholarly community, specific stakeholders, and the public? ■ Is the target audience at particular risk or open to new opportunity? ■ What social, economic, or human consequences could result from not addressing the issue? ■ What competing opportunities would be set aside by addressing this issue?
	Goals/ Objectives of Consequence	■ Have all stakeholders agreed that the goals and objectives are valuable? ■ If the goals are accomplished, will there be a significant consequence or impact? ■ Will value be added?

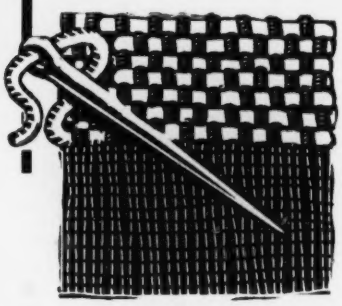
evaluative components, questions, and indicators, tailoring the matrix to the culture and expectations of their study area and examining the relevance of various measures to the specific project.

Priorities. The matrix does not assign priorities or relative values to the dimensions or components of quality outreach. It is impossible to do so absent knowledge of the professional traditions and expectations of the users. When "customizing" the matrix, users will want to determine the relative values of the dimensions, components, and indicators as they apply to their area of study and the nature of the project.

Documentation. Both quantitative and qualitative indicators contribute to the quality assessment of an outreach project. As a quantitative measure, for example, a high number of participants can support claims that others value the project. Similarly, the size of follow-up funding can indicate the significance of the outcomes. As a qualitative measure, a reflective narrative by the project director(s) may be an important document at various places in the matrix. A narrative containing annotated and persuasive arguments concerning the significance of the project, the attention paid to context, the process, the scholarly value, and the importance of the outcomes may lend support to claims of quality. The narrative may also include sections written as planning documents, as process logs, and as retrospective analysis of the entire project and outcomes.

EXAMPLES OF QUALITATIVE INDICATORS	EXAMPLES OF QUANTITATIVE INDICATORS
■ Documentation of issues and opportunities based on concrete information; e.g., opportunity assessment, social economic indicators, stakeholder testimony, previous work. ■ Leaders in the field or public figures addressing the issue, citing the need. ■ The magnitude of the issue; i.e., size, trends, future directions. ■ Description of competing opportunities set aside.	■ Indicators of demand/need. ■ Number of citations; issue addressed in the literature. ■ Financial and other resource contributions. ■ Number of participants. ■ Calculation of opportunity cost in terms of resources (i.e., people, projects, revenues).
■ Narrative discussing scope and potential impact. ■ All stakeholders understand the goals and objectives as stated. ■ Increased visibility in community or profession; new structures created; new skills developed and knowledge generated.	■ Projections of scope and potential impact. ■ Degree of opportunity to change the situation.

MATRIX FOR EVALUATING QUALITY OUTREACH (continued)

DIMENSION	COMPONENTS	SAMPLE QUESTIONS
Context 	Consistency with University/Unit Values and Stakeholder Interests	■ To what extent is the project consistent with the university's/unit's mission? ■ To what extent is the project a high priority among the external stakeholders? ■ Does the plan recognize the relevance of ethical and professional standards for the initiative? ■ Does the project demonstrate sensitivity to diverse audiences and interests? ■ Is there an appropriate fit (consideration of the interests and well-being of all participants) between the target audiences and the goals and objectives?
	Appropriateness of Expertise	■ To what extent does the project fit with the individual's and the unit's available expertise and research? ■ To what extent does the project utilize appropriate expertise among the stakeholders and/or external sources?
	Degree of Collaboration	■ To what extent do all the stakeholders participate in planning, defining impacts, implementing, and assessing the project? ■ To what extent is communication and interaction open and multi-directional? ■ Does the nature of the collaboration lead to timely and effective decision-making? ■ What contribution does the collaboration make to capacity building and sustainability?
	Appropriateness of Methodological Approach	■ Is there an appropriate approach underlying the design; i.e., developmental, participatory? ■ Does the project utilize an appropriate methodology? ■ How does the project recognize and accommodate for the variety of learning styles, ways of decision-making and taking action, and education levels of the stakeholders? ■ Does the project have a comprehensive and informative evaluation plan? ■ Is there a plan to determine whether or not the project/collaboration will/should continue?
	Sufficiency and Creative Use of Resources	■ Are available resources sufficient to the scope of the effort? ■ To what extent are multiple sources and types of resources (i.e., human, financial, capital, volunteer, etc.) being utilized? ■ Are the goals/objectives realistic considering the context and available resources?

EXAMPLES OF QUALITATIVE INDICATORS	EXAMPLES OF QUANTITATIVE INDICATORS
■ Comparison with explicit mission statements and goals. ■ Plans recognizing ethical issues and regulations/guidelines to assure compliance. ■ Evidence of ability to work sensitively with external audiences and key groups. ■ Interviews with those potentially affected by the project. ■ Comparison with stakeholder reports, proposals, letters of inquiry.	■ Number of contacts and planning meetings of stakeholders. ■ Resources/methods used to promote program. ■ Profile of audience; i.e., demographic characteristics.
■ Evidence of scholarship related to project or prior work in the field. ■ Narrative showing degree of fit between project needs and expertise deployed. ■ Relevant offices and organizations involved in the project.	■ Numbers and types of expertise involved; e.g., tenure-track faculty, academic staff, students, stakeholders, external consultants. ■ Number of stakeholders in leadership roles. ■ Related activities; e.g., years of experience, numbers of articles.
■ Language and structure of partnership agreements. ■ Identification, participation, and retention of all stakeholders. ■ Communication logs and minutes of meetings. ■ Progress report from stakeholders.	■ Number of partners or collaborative arrangements. ■ Number of intra-institutional linkages. ■ Number of inter-institutional linkages. ■ Number of planning meetings. ■ Percentage of deadlines met.
■ Evidence of scholarship on the application of the method to related issues. ■ Evidence of adaptation during project implementation. ■ Evidence that audience education level and learning style were considered. ■ Process documentation by project director through journals, etc.	■ Number of instances of innovations in delivery; e.g., student involvement, use of technology.
■ Evidence of integration and creative use of multiple types and sources of resources. ■ New funding sources identified and leveraged.	■ Amounts and types of the resources by source. ■ Changes in extramural funding for outreach activities.

MATRIX FOR EVALUATING QUALITY OUTREACH (continued)

DIMENSION	COMPONENTS	SAMPLE QUESTIONS
Scholarship	Knowledge Resources	■ To what extent is the project shaped by knowledge that is up-to-date, cross-disciplinary, and appropriate to the issue? ■ Is knowledge in the community or among the stakeholders utilized? ■ To what extent is there an awareness of competing methodologies, replicable models, expertise, and/or writing related to the project?
	Knowledge Application	■ How well are the project and its objectives defined? ■ Is the project design appropriate to the context and does it recognize the scope, complexity, and diversity? ■ To what extent is there innovation in the application of knowledge and methodologies? ■ Does the plan foresee a potential new application of knowledge gained for use in specific settings? ■ Does the plan include provision for ongoing documentation of activities, evaluation, and possible midstream modification?
	Knowledge Generation	■ Does the project plan pose a new model or hypothesis in addressing the issues? ■ Was new knowledge generated; i.e., program hypotheses confirmed or revised, outcomes creatively interpreted, new questions for scholarship asked? ■ Were unanticipated developments appropriately incorporated into the final interpretation of the results?
	Knowledge Utilization	■ Are the stakeholders and potential interest groups involved in understanding and interpreting the knowledge generated? ■ Is the knowledge generated by the project available for dissemination, utilization, and possible replication? ■ In what ways is the knowledge being recorded, recognized, and rewarded?

EXAMPLES OF QUALITATIVE INDICATORS	EXAMPLES OF QUANTITATIVE INDICATORS
■ Annotated narrative showing what sources of knowledge are used; i.e., community assessments, previous works, and applied theory. ■ Quality and fit of the citations, outside experts, or consultants. ■ Assessment of experience and accomplishments of major project participants external to the university.	■ Number of cross-disciplinary resources utilized. ■ Number of years in positions. ■ Dates of citations. ■ Number of experts cited, participating.
■ Professional feedback on the clarity of the project. ■ Input from community, stakeholders, students, etc., attesting that the project plan is clear, appropriate, inclusive, and understandable. ■ Reflective narrative, rationale for project, and documentation of the design process.	■ Number of in-house communications related to the project; e.g., in-house documents, interim reports, newsletters, e-mail messages, chat rooms, bulletin boards. ■ Number of citations from the literature circulated within the project.
■ Lessons learned documented. ■ Assessment of scholarly merit by internal peer review process. ■ External review of performance by stakeholders relative to innovation, satisfaction with approach and results. ■ Project garnered awards, honors, citations relative to its scholarship.	■ Number of times project cited, recognized. ■ Number of acceptances for publications, speaking engagements. ■ Number of requests for consulting. ■ Number of programs, curricula influenced by scholarly results. ■ Publications in refereed journals. ■ Professional speaking engagements.
■ Stakeholder feedback. ■ Project generated a replicable, innovative model. ■ Nature of groups or institutions applying knowledge generated. ■ Case studies or examples of utilization.	■ Scope of involvement in interpretation and dissemination; e.g., numbers and types of participants. ■ Number of different avenues chosen to communicate results.

MATRIX FOR EVALUATING QUALITY OUTREACH (continued)

DIMENSION	COMPONENTS	SAMPLE QUESTIONS
Impact	Impact on Issues, Institutions, and Individuals	■ To what extent were the project goals and objectives met? ■ Did the products or deliverables meet the planning expectations? ■ Were intended, unintended, and potential impacts documented and interpreted? ■ Was that documentation rigorous, thorough, understandable, and defensible? ■ Were stakeholders satisfied? Did they value the results and apply the knowledge? ■ Is the project affecting public policy? Has it improved practice or advanced community knowledge? ■ Do impacts have commercial, societal, or professional value? ■ How effectively are the products or results reaching the intended interest groups?
	Sustainability and Capacity Building	■ To what extent did the project build capacity for individuals, institutions, or social infrastructure; i.e., financial, technological, leadership, planning, technical, professional, collaborative, etc.? ■ To what extent did the project develop mechanisms for sustainability? ■ To what extent did the project leverage additional resources for any partners? ■ To what extent were undesired dependencies eliminated?
	University-Community Relations	■ To what extent did the stakeholders come to understand and appreciate each other's values, intentions, concerns, and resource base? ■ To what extent was mutual satisfaction derived from the project? ■ To what extent did the project broaden access to the university? ■ To what extent did the project broaden access to the community?
	Benefit to the University	■ How does the project offer new opportunities for student learning and professional staff development? ■ How does the project lead to innovations in curriculum? ■ How does the project inform other dimensions of the university mission? ■ How does the project increase cross-disciplinary collaborations within the university? ■ How does the project increase collaboration with other institutions? ■ How does the project assist the unit's or faculty member's progress in developing outreach potential and in using that potential to improve the institution's operations and visibility?

EXAMPLES OF QUALITATIVE INDICATORS	EXAMPLES OF QUANTITATIVE INDICATORS
■ Description of impacts (i.e., significance and scope of benefits) on the issue, stakeholders, and beneficiaries, to include: Needs fulfilled, issues addressed, population or group involved in process. Institutional processes changed. Replicable innovation developed. ■ Documentation such as program evaluations, surveys, letters, testimonials, and media coverage. ■ Testimony and validation from peer review. ■ Referrals to others and expression of interest by new groups. ■ Assessments on learning outcomes by individuals, students, and stakeholders. ■ Benefits resulting from changes in practice; e.g., knowledge applied, processes or approaches more efficient, circumstances improved. ■ Results of changes in institutional and/or public policy. ■ Evidence that knowledge is used in subsequent research, projects, or public discussion.	■ Changes from benchmark or baseline measurements. ■ Number of appropriate products generated for practitioners and public (e.g. technical reports, bulletins, books, monographs, chapters, articles, presentations, public performances, testimony, training manuals, software, computer programs, instructional videos, etc.). ■ Number of products distributed. ■ Number and percentage of beneficiaries reached. ■ Number of contracts, patents, copyrights.
■ Inventory of new or developed skills. ■ Technology adopted and maintained. ■ Surveys or reports of changed behaviors or attitudes. ■ Activities and processes institutionalized. ■ Networks activated. ■ Cross-disciplinary linkages activated. ■ Continued or alternative resources secured; e.g., funding, facilities, equipment, personnel. ■ Planned degree of disengagement or continuing partnership achieved.	■ Quantitative changes in skills, technologies, behaviors, activities, etc. ■ Amount of resources generated to sustain the project. ■ Amount of resources leveraged. ■ List of facilities, equipment, personnel available. ■ Number of sites and cross-site linkages established.
■ Co-authored reports and presentations. ■ Opportunities for new collaborations established. ■ Testimonials from partners. ■ Community partner participation in grading students, evaluating faculty/staff efforts. ■ Expansion of university/unit constituency. ■ Role flexibility and changes that provide for greater university/community interaction.	■ Number of new collaborations considered or established. ■ Number of off-campus courses offered with syllabus modifications to accommodate nontraditional students. ■ Evidence of increased demand placed on the unit or faculty for outreach.
■ Changes in quality or scope of student experiences. ■ Curricular changes (e.g. new syllabi, courses, curricular revisions). ■ Teaching or research activities benefiting from outreach involvement, including cross-disciplinary research or program innovations. ■ Enhanced unit reputation. ■ Recognition in reward and accountability systems.	■ Amount of increased student support. ■ Number of employment offers to students. ■ Number of new courses and programs approved. ■ Number of new cross-disciplinary or inter-university collaborative efforts. ■ Increased engagement of faculty or students in outreach. ■ Amount of increased external or university support for outreach. ■ Revenue generated.

The dean who was interested in offering off-campus degree programs through distance education technologies has developed an evaluation plan for students to reflect on their own experiences as participants in the learning process. Those reflections have been incorporated into experiments with some new approaches. The seriousness with which the students accepted the project has convinced additional faculty to participate in the new technologies.

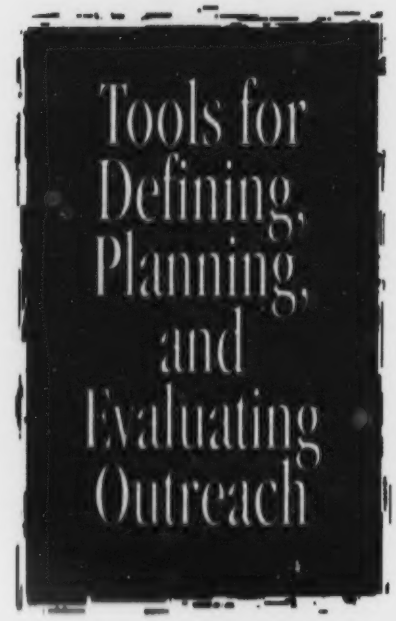
The new, untenured faculty member (described at the beginning of this guidebook) who expressed concern about rewards and recognition for outreach efforts has developed, with the unit chair and faculty review committee, a personal work plan that, if successful, will lead to tenure and promotion. The plan satisfies the individual's personal goals of working with external stakeholders and furthers the outreach goals of the unit. In addition, criteria for evaluating the faculty member's outreach work, based on the development of an outreach portfolio and acceptable qualitative and quantitative measures, will be shared with the faculty review committee at the time of annual performance review as well as at the time of tenure.

The unit chair who was attempting to balance priorities with available resources has spent a year working with the faculty advisory committee to develop an outreach plan. With input from relevant stakeholders, that plan balances the teaching, research, and service missions of the unit and is aligned with the mission of the college and the university. The next ambitious step: to assist the college dean and university administrators in adopting a similar planning process across the university.

OUTREACH PROJECT EXAMPLE

Professional Development and Technology Innovation: K-12 Education

The College of Education links faculty and students with community schools and teachers, placing interns directly with K-12 teachers and administrators. As part of this effort, the Technology Exploration Center integrates teaching and technology both on campus and in schools statewide. The College seeks to help teachers and children in schools throughout the state understand and integrate technological innovation.



APPENDIX

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TOOL A

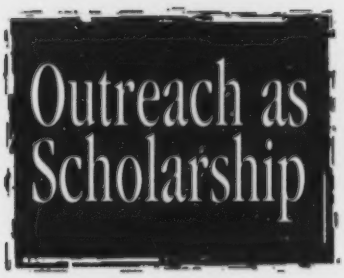
THE MSU MODEL: DEFINING & INTEGRATING OUTREACH

The Provost's Committee on University Outreach defines outreach as

. . . a form of scholarship that . . . involves generating, transmitting, applying, and preserving knowledge for the direct benefit of external audiences in ways that are consistent with university and unit missions *(University outreach at Michigan State University: Extending knowledge to serve society,* October 1993, p. 1).

Outreach occurs when members of the university make their expertise available to respond to pressing learning needs, problems, or issues identified by such external stakeholders as local communities, citizen groups, state, national, or international agencies, business or industrial firms and associations, labor organizations, K-12 schools, health and welfare organizations, or other public sector or nonprofit organizations. The relationship with external stakeholders is most often collaborative and may be long-term or short-term.

Outreach may take many forms, such as off-campus credit instruction, noncredit instruction, applied research, technology transfer, demonstration projects, evaluation studies, policy analysis, or technical assistance.



The essence of scholarship is the thoughtful creation, interpretation, communication, or use of knowledge that is based in the ideas and methods of recognized disciplines, professions, and interdisciplinary fields. What qualifies an activity as "scholarship" is that it is deeply informed by accumulating knowledge in some field; that the knowledge is skillfully interpreted and deployed for a particular setting; that the activity is carried out with intelligent openness to new information, debate, and criticism; and that, over time, new knowledge is added to the field of study.

Outreach, like other dimensions of a university's academic mission, is rooted in scholarship. When scholars generate knowledge, they discover or create it; when scholars transmit knowledge, they share it with others; when scholars apply knowledge, they do so for the purpose of helping others better understand, and sometimes address, circumstances and problems; and when scholars preserve knowledge, they seek to save what has been learned for future access.

Outreach as Integration Across the Mission

In the MSU outreach model, as defined and explained in the *Report by the Provost's Committee on University Outreach*, outreach is not seen simply as a synonym for "service"; rather, each aspect of the tripartite mission of the university—teaching, research, and service—can be viewed as having outreach forms and non-outreach forms. Some activities span the three categories, and there are linkages between non-outreach and outreach activities. This guidebook suggests ways to document and evaluate the outreach components of faculty and unit activities—that is, those components that have a public, community, or external impact. In order to identify those components, the relationship of outreach to teaching, research, and service is briefly described here. Each major administrative unit will need to specify its own interpretation of the definition.

Outreach and Teaching Typically, outreach teaching provides access (a) through credit courses offered in off-campus locations during hours set to accommodate the schedules of nontraditional students or (b) through noncredit seminars, workshops, conferences, exhibits, and performances for continuing professional education or to a nonacademic audience.

Outreach and Research Rather than establishing a dividing line between those research activities that are categorized as outreach and those that are not, research is better viewed as a continuum. Outreach research is contextualized to address problems in the real world and to develop knowledge for a particular setting. The best outreach research is that which helps the faculty member to advance knowledge while simultaneously assisting external entities to address problems; that is, while the community may be defined as the primary beneficiary, the researcher and the body of knowledge also benefit. While a particular project may be viewed both as research and as outreach, evaluating the outreach component requires a perspective that considers the significance, context, knowledge application, and external and internal impacts.

Outreach and Service The line between outreach and those activities frequently grouped under the rubric of "service" is much more distinct. The "service" part of the mission covers university service, professional service, community service, and public service. Participating in university affairs through faculty governance and departmental, college, and university committees is *service to the university* but is not outreach (target group is internal). Peer reviewing journal or book submissions, organizing scholarly meetings, administering or advising an academic professional organization are examples of *service to the profession*, but they are not outreach activities (target groups are disciplinary-collegial). Serving on the board of a social service agency or volunteering at the soup

A

kitchen represent *community service* (and good citizenship) but not outreach (service not directly related to the faculty member's scholarly expertise). While these three forms of service are not related to outreach, extending expert knowledge in *service to the public* is frequently tied to the concept of outreach; for example, a professor of reading provides organizational support to a community's literacy coalition, or a professor of urban planning advises East Lansing on the design of the Grand River median strip. However, public service is not a synonym for outreach. Rather, the MSU model emphasizes *outreach across the mission dimensions*, performed for (and with) the particular sectors of the public which will benefit directly from faculty expertise.

Outreach Integration Some scholarly activities integrate teaching, research, and service. Technical assistance and consulting, for example, could be considered forms of teaching or of service, or they could involve research. And some activities link outreach and non-outreach work. The results of non-outreach research, for example, are often later transmitted to external users. Some activities could rightly be placed in more than one category. As long as the activities are *scholarly* and are conducted for the direct benefit of *external audiences* in ways that are *consistent with university and unit missions,* they can be considered outreach.

Given these general university-wide definitions, units are encouraged to adopt specific operational definitions, as needed, to establish consensus about what types of activities will be viewed as outreach, the relative value of those activities compared to other aspects of the unit's mission, and how those activities will be evaluated and rewarded. Faculty should feel secure in knowing what activities will be "counted" as unit outreach, and, correspondingly, units should create reporting systems to document, account for, and evaluate those outreach activities with indicators of importance to them.

UNIT PLANNING & PRIORITY SETTING

TOOL B

This tool suggests one way a unit might identify its outreach priorities. The three-step process integrates a strategic planning session, a self-study exercise, and decision-making. It could be accomplished in three separate workshops or meetings, perhaps utilizing an outside facilitator. The Matrix for Evaluating Quality Outreach projects should be used in conjunction with this tool to further plan and then evaluate the projects the unit chooses to prioritize and adopt. The unit chair is encouraged to involve faculty and appropriate external constituents when using this tool.

Step I. Develop a Shared Vision: What Can/Could the Unit Be Doing?

A. Mission or Need-driven Priorities

Reflect and Discuss: What types of outreach activities might be encouraged as part of the unit's mission? In what areas has the unit established a history of quality outreach? How can individual faculty members enhance this record? Which parts of the community can the unit best serve and how might it serve them best (education, industry, small business, social agencies, health care, government, community organizations)?

List: Mission or need-driven priorities as reflected in
- University or college priorities
- Thematic or disciplinary objectives
- Unit strategic plans
- External audience requests, problems

B. Resource Constraints or Limitations

Reflect and Discuss: How much outreach does the unit want to do with its given resources? How many FTEs are available? What external funding could be made available? How might entrepreneurial activities be established?

List:
- Current commitment and availability of personnel for outreach activities
- Access and operational costs for outreach including opportunity costs such as travel time lost for other activities

C. Expertise Availability

Reflect and Discuss: What skills do faculty bring and how do they match needs of external constituencies? How willing are faculty to participate in outreach? What balance does the unit expect faculty to maintain among research, teaching, and service; and how much of each is outreach oriented?

List:
- Skills and expertise available
- Skills and expertise needed

D. Strategic Outreach Opportunities

Reflect and Discuss: What new opportunities exist? Which are strategically significant to help reach university, unit, or disciplinary missions and goals?

List:
- University and/or community policy agendas
- Unique population or contextual (e.g., geographic) opportunities
- Funding opportunities
- Collaborative potentials, relationship building
- Opportunities to enhance operational efficiency

Step II. Describe and Rate Importance and Performance: What Is the Unit Doing Now?

A. Describe Current Efforts

Reflect and Discuss: In what ways do faculty currently interact with practicing professionals and meet constituent needs for information and education? How is the unit serving its communities of interests?

List: Major current outreach initiatives—programs, projects, activities, etc.

B. Assess Current Performance

The chair is encouraged to secure input from external constituents. The step should help identify current gaps or areas for future outreach concentration.

For each program initiative list above:

First, rate the importance of each initiative against your most appropriate set of standards identified in Step I. How important is each initiative in achieving the goals set forth in the standards you chose? Use a rating system of 1 for very important, 2 for less important initiatives.

Second, rate your satisfaction about how well you believe each initiative is doing to meet needs and/or reach goals. Using a rating system of 1 for high satisfaction and 2 for low satisfaction with each initiative.

Third, use these ratings to place initiatives in four categories:

I. High Importance (1) High Satisfaction (1)	II. High Importance (1) Low Satisfaction (2)
III. Low Importance (2) High Satisfaction (1)	IV. Low Importance (2) Low Satisfaction (2)

Current initiatives in quartile I (high importance, high satisfaction) are strong candidates to be continued. Current initiatives in quartile II (high importance, low satisfaction) may need to be examined to determine how satisfaction might be increased. Current initiatives in quartile III (low importance, high satisfaction) may need to be examined to determine whether and how they might be changed to gain in importance. Current initiatives in quartile IV (low importance, low satisfaction) represent opportunities to redeploy resources to achieve more important, more satisfactory results.

Step III. Choose Outreach Priorities: What Should/Will the Unit Do?

Reflect and Discuss: Using the results from Step II, which current outreach initiatives need to be continued as they are? How might the importance and satisfaction of initiatives be enhanced? Which new potential outreach initiatives would best fill gaps identified and/or strengthen unit efforts? Where might resources be found to launch new initiatives or augment current ones?

List: Current and potential unit outreach initiatives

Prioritize: Determine which initiatives the unit will adopt. Identify unit faculty who will be primarily and secondarily involved and the primary external stakeholders involved. Design a timetable for each, including deadlines for initial planning, consultation, implementation, and evaluation.

REWARDING QUALITY OUTREACH

TOOL C

This tool is meant to prompt discussion within a unit about how it may reward faculty for quality outreach. The tool is especially useful for units where outreach scholarship and outreach expectations are relatively new concepts. Determinations at the unit level must be consistent with university rewards structures, policies, and procedures. Where the unit adopts a more inclusive rewards policy, more consistent with the institutional and unit mission, than is found at other levels, it is incumbent on the unit to argue that its policy be recognized and accepted. Arguments developed using this tool can assist in this task.

Step I. Outreach As Scholarship

Reflect and Discuss: What characteristics of scholarship germane to the discipline or profession are manifest in the unit's outreach activity? How is outreach scholarship most sensibly shared, disseminated, and utilized? Do traditional measures of scholarly quality suffice in documenting quality scholarship in outreach? What would the unit require of a reflective essay written by a faculty member to demonstrate the scholarly significance of his or her outreach project to assist it in measuring scholarly quality?

Identify and Develop:

- The primary characteristics of scholarship in your discipline or profession
- Measures of scholarly quality
- A prototype for appropriate documentation

Step II. Outreach as Part of Unit Mission

Reflect and Discuss: What are the benefits to the unit if its faculty extend their expertise and knowledge to external, nonprofessional groups through participation in outreach? Are these benefits consistent with the unit's traditional, professional values of scholarly inquiry, teaching, and publication? What arguments are persuasive in elevating outreach expectations to a level comparable with the teaching and research expectations of faculty?

What implications are there for your unit, situated as it is within your institution's profile within the broader social community as a locus of higher education? How are technological advances in communication and connectivity impacting your ability to engage successfully in outreach?

Identify and Develop:

- A list of the benefits of outreach to your unit
- A list of traditional professional values and how outreach activities relate to them
- Expectations of outreach projects that would make it commensurate with other traditional annual expectations of a faculty member
- Unit role within the institutional context within the broader society
- Specific technologies that can facilitate outreach success

Step III. Rewarding Quality Outreach

Reflect and Discuss: What types of scholarly projects will be rewarded? How will they be rewarded? Will the rewards vary with the type of activity; i.e., is there an implicit or explicit rank order across the activities?

Review:

- Unit by-laws, and promotion, tenure, and merit salary guidelines
- Ways that value can be attached to various scholarly activities
- The range of available rewards; e.g., tenure, promotion, salary, assignment
- What rewards are and are not possible for outreach scholarship

EVALUATING UNIT OUTREACH

TOOL D

Please utilize the Matrix for Evaluating Quality Outreach to assess the quality of outreach projects and activities for which the unit had primary responsibility for the period under review. The following are additional suggestions to evaluate the outreach accomplishments of a unit.

Purpose

- Internal Review, Self-Study
- College or University-level Quality Assessment: Budget Process

Check-Sheet:

I. Projects/Activities

List projects and activities for which the unit has taken primary leadership.

A. Overall Performance. Submit a general assessment of each project resulting from the application of the Matrix to its significance, context, scholarship and impact. What is the overall quality level of projects and activities of the unit?

B. Number of Distinct Projects. Provide the number of distinct projects (not repetitions o the same project in different locations). Is the number of projects undertaken appropriate given the unit's mission and the size of its faculty?

C. To what extent can one detect coherence of purpose and objectives among the unit's outreach projects and activities? Have the projects and activities been mutually supportive such that the collective efforts are more than the sum of the parts?

D. To what extent have unit decisions on outreach activities met university expectations and priorities?

E. To what extent have unit decisions on outreach activities responded to professional expectation and research agenda?

II. Personnel

A. List faculty and staff participants in the project and activities mentioned in Part I. What percent of the unit's faculty and staff are involved (either in FTEs or head count)? Is this number consistent with unit mission and faculty/staff competence?

B. Have faculty or staff been hired during the period under review with specific responsibilities to the unit's outreach mission? What percent of their appointment is outreach related?

C. To what extent have unit administrators assisted faculty and staff to incorporate significant outreach projects and activities in their careers? Is professional development and continuity in the outreach mission apparent in faculty and staff resumes?

III. Infrastructures

A. Does the unit have polices and procedures in place that evaluate, recognize and reward outreach achievements in merit increases or raises, tenure and promotion, awards competitions?

B. List faculty and staff whose outreach accomplishments have been recognized and rewarded in any of these categories.

C. Has the unit acquired the necessary equipment of technology to achieve its outreach objectives or arranged regular access to such equipment of technology?

D. Are appropriate mechanisms or structures in place that promote continuity and sustainability, if desired?

IV. Recognition

A. Provide any evidence that external groups of agencies or professional or peer institutions have recognized the unit for its outreach.

B. Have unit faculty or staff been asked to assume appropriate responsibilities with external agencies or groups associated with the unit's outreach?

C. Number of students or interns offered employment by external groups, collaborating with the unit.

V. Additional Measures of Achievement

Consolidate individual and project achievements in a unit report covering the period under review in any of the following categories:

A. Number of students enrolled in off-campus credit instruction (may be stated as Student Credit Hours)

B. Number of off-campus courses offered using distance education technology

C. Number of certificate or degree programs available via distance education

D. Number of distinct projects or activities sponsored

E. Total participant hours at these activities

DEVELOPING A FACULTY OUTREACH PORTFOLIO

TOOL E

The suggestion in this tool for developing an outreach portfolio assume its primary use to be by peer review committees to evaluate the quality of an individual's outreach efforts, especially for promotion and tenure decisions. For the annual merit review process, faculty are encouraged to report their annual outreach activities in such a way that the report may become part of a career portfolio.

In general, the portfolio should profile the outreach activity and productivity within the context of a faculty member's university appointment and any subsequent modifications in the expectations of that appointment over the years. The portfolio should highlight two or three exemplary outreach activities that demonstrate the acquisition, development, and maintenance of the faculty member's expertise—consistent with one's position at the university, the unit mission, and the needs and desires of external constituents—and the application and advancement of that expertise with appropriate external stakeholders.

In this light, the portfolio should include most of following elements, which, of course, should be updated periodically:

I. Career Background/Context

- When hired, at what rank
- Description of position at time of hiring, outreach component
- Scholarly expertise and outreach applications
- Modifications in appointment expectations over time

II. Personal Narrative

The individual's outreach objectives and their relationship to his or her scholarly agenda, unit mission, and societal needs

III. Activities

This section should include a list and description of significant outreach activities in which the faculty member has had a major role. It should also provide (or direct reviewers to) appropriate qualitative indicators that evaluate the quality of each activity, according to unit-affirmed criteria and expected forms of measurement (e.g., based on the questions and indicators in the Matrix for Evaluating Quality Outreach Projects contained in Section III of this guidebook. As discussed elsewhere in the report, all qualitative indicators are not equal. Units will have determined the relative value of each of the multitude of indicators that comprise a comprehensive project evaluation. And qualitative evaluations must be sought from those most able to provide informed assessment (e.g., scholarly

merit and appropriateness of expertise and project design from peers; impact from affected stakeholders, etc.).

- Narrative describing the activity, the reasons why it was undertaken, the individual's role if a collaborative project, and how the activity contributed to his or her scholarly advancement.
- Significance of the activity to the stakeholders and to the profession/ discipline, including indicators.
- Context: Match between faculty expertise and project objectives/stakeholder needs, including indicators.
- Scholarship, including any scholarly peer reviews of the activity and its results. If none are available, an extended discussion of the scholarly merit of the project by the faculty member is appropriate.
- Impact of the activity, including indicators.

Faculty seeking further discussion of portfolio development may wish to consult some of the following references:

Braskamp, L. A. (1994). *Assessing faculty work: Enhancing individual and institutional performance.* San Francisco: Jossey-Bass.

Edgerton, R., Hutchings, P., and Quinlan, K. (1992). *The teaching portfolio: Capturing the scholarship in teaching.* Washington, D.C.: AAHE.

Seldin, P. (1991). *The teaching portfolio: A practical guide to improved performance and promotion/tenure decisions.* Boston: Anker.

Shulman, L. (1988, Nov.). A union of insufficiencies: Strategies for teacher assessment in a period of educational reform. *Educational Leadership*, 36-46.

EVALUATING INDIVIDUAL OUTREACH

TOOL F

Purpose

- Tenure Decision, Promotion to Associate Professor
- Promotion to Professor
- Annual Merit Increase
- Award

Check-Sheet

I. Projects/Activities

List projects and activities in which the individual has played a significant role.

A. General Evaluation. Submit documentation gathered through the application of the Matrix for Evaluating Quality Outreach to projects/activities in which the individual played a major role.

B. Description of Individual's Role in Each

C. Contributions. If not holding primary responsibility, submit evaluation by project/activity director(s).

II. Current Appointment and Professional Expectations

What explicit outreach expectations have been included in recent annual reviews and planning sessions for this individual? How well do the outreach achievements meet the professional expectations outlined in the current appointment? To what extent is the individual expected to demonstrate continuous achievement in outreach over time? Is the expectation linked to a specific assignment or length of time?

III. Career Development

Is there a discernible career path that has well prepared the individual for the outreach activities in which the individual is engaged? How have outreach accomplishments contributed to the reputation and standing of the individual in the unit, university, profession, among external groups? Do the accomplishments fully or partially meet the criteria for tenure (expectation of career-long productivity, accomplishments of quality, dedication to the values of the unit awarding tenure, etc.)? Do the accomplishments fully or partially meet the criteria for promotion to professor (accomplishments of significant merit, etc.)?

IV. Memoranda of Understanding
Include any memos from university administrators assigning the individual specific responsibilities for outreach. To what extent were any new assignments part of a long-term planning process? To what extent were peers apprised of these understandings?

V. Unit Responsibilities/Mission
How well do the outreach accomplishments reflect unit priorities? How have the outreach accomplishments fulfilled unit/university expectations of the individual in other areas of responsibility (teaching, research, and service)? To what extent has the individual motivated others in the unit to contribute to the outreach mission of the unit/university? What kinds of on-going collaboration have resulted from the outreach initiatives and achievements of the individual?

RESOURCE MATERIALS

TOOL G

Arnold, R. (1995). *A guide to the guidelines.* Corvallis, OR: Oregon State University, Office of Academic Affairs.

Baldrige, Malcolm National Quality Award. (1996). 1996 *award criteria.*

Boyer, E. (1990). *Scholarship reconsidered: Priorities of the professoriate.* Princeton, NJ: The Carnegie Foundation for the Advancement of Teaching.

Braskamp, L.A., & Ary, J.C. (1994). *Assessing faculty work: Enhancing individual and institutional performance.* San Francisco: Jossey-Bass.

Diamond, R.M. & Adam, B.E. (Eds.) (1993). *Recognizing faculty work: Reward systems for the year 2000. New Directions for Higher Education No. 81.* San Francisco: Jossey Bass.

Elman, S., Smock, S. (1985). *Professional service and faculty rewards: Toward an integrated structure.* Washington, D.C.: National Association of State Universities and Land Grant Colleges.

Farmer, J.A., & Schomberg, S.F. (1994, Fall). The evolving concept of public service and implications for rewarding faculty. *Continuing Higher Education Review,* 122-140. Champaign, IL: University of Illinois at Urbana-Champaign.

Farmer, J.A., & Schomberg, S.F. (1993). *A faculty guide for relating public service to the promotion and tenure review process.* Champaign, IL: University of Illinois at Urbana-Champaign, Office of Continuing Education and Public Service.

Gibbs, G. (1995, May/June). Promoting excellent teaching is harder than you think. *Change,* 17-20.

Haertel, E.H. (1991). *Review of research in education: New forms of teacher assessment.* Stanford, CA: Stanford University.

Lynton, E.A. (1995). *Making the case for professional service.* Washington, D.C.: American Association for Higher Education.

Lynton, E.A. (1994, Fall). Faculty roles in the context of the departmental mission. *The Department Chair,* 5(1), 18-19; corrected version 5 (Winter 1995), 8-10.

Michigan State University. (1994, July). *Background papers to university outreach at Michigan State University: Extending knowledge to serve society. A report by the Provost's Committee on University Outreach*. East Lansing, MI: Michigan State University.

Michigan State University. (1993). *University outreach at Michigan State University: Extending knowledge to serve society: A report by the Provost's Committee on University Outreach.* East Lansing, MI: Michigan State University.

Rice, E.R., & Richlin, L. (1993). Broadening the concept of scholarship in the professions. In L. Curry, J. Wergin, and Assoc. (Eds.). *Educating professionals*. San Francisco, CA: Jossey-Bass, pp. 281-315.

Sandmann, L.R. (Ed.) (1996). *Fulfilling higher educational covenant with society: The emerging outreach agenda summary of the Capstone Symposium.* East Lansing, MI: Michigan State University.

University of Wisconsin-Madison, Council on Outreach. (1995). *Suggestions for planning, documenting, and evaluating outreach.* Madison, WI: University of Wisconsin-Madison.

Virginia Polytechnic Institute and State University. (1990). *Evaluation of faculty effort in extension and service: Committee review.* Blacksburg, VA: Virginia Polytechnic Institute and State University.

GLOSSARY OF CRITICAL TERMS

Audience: See Stakeholder

Collaborate: To work jointly with others on a project. Those collaborating with others take on specified tasks within the project and share responsibility for its ultimate success. *Points of Distinction* avoids the term "cooperate," as it implies a lead group with primary project management responsibilities and others who support and implement project goals. Relationships there are less equitable.

Community: The collective group of individuals and organizations with common interests and objectives, external to the university, with whom (or a subset of whom) the university collaborates in outreach. *Points of Distinction* believes successful outreach projects blur the distinctions between the university and the external community. Indeed, in outreach the university strives to project an image that it is part of the community. Nevertheless, in the sense of the university as an institution and employer, it is often important to recognize that there are university interests that are distinct from those of the community.

Constituent: See Stakeholder

Context: As one of the four fundamental characteristics of an outreach project, "context" carries with it the active sense of "contextualize." Responsible planners will gather as much information, expertise, and experience as possible to adequately assess the situation into which an "intervention" is planned. An outreach project with the potential for success has recognized, as fully as necessary, the broad and complex context within which it would be situated and how it would alter the lives of people it touched, trying to optimize the potential benefits and to avoid unnecessary dangers and risks. Embedded in our responsibility to assess the extent of our effect on context is the expectation of a multidisciplinary, multi-resource approach to planning, implementation, and evaluation.

Cross-Disciplinary Approach: One of the fundamental outreach values, based on an inclusive, multi-resource approach to problem-solving. Although a term of the academy, "discipline" should be viewed broadly to include practices and professions as well as scholarly disciplines, as defined by scholarly associations and journals. A cross-disciplinary approach assumes that professionals are working collaboratively as a team as they assemble disciplinary and practical expertise and apply appropriate, yet various, ways of looking at the issues. As a term, "cross-disciplinary" tries to avoid the association with superficiality, a criticism often leveled against "interdisciplinary" approaches, and the concern that little synthesis or interaction among scholars occurs in a "multidisciplinary" approach.

Deliverables: Tangible products of a project or services provided, usually those that have been negotiated, planned in advance; often generating income for the developers. Important objects in outcomes assessment.

Disciplinary Approach: See Cross-Disciplinary Approach

Impact: Those effects (products, insights, and new practices), resulting from an outreach project, that lead to significant changes in the way people are able to live their personal and professional lives. Impacts can result from anticipated outcomes, as seen in project planning, or in the inevitable, unanticipated outcomes that have eventuated during the project. Impacts can be positive, neutral, or negative, and it is important that the project document impacts in ways that will assist in future planning in both the professional and practical world.

Indicator: In the evaluation of outreach, indicators provide evidence of quality. An indicator in its own right does not imply quality; evaluators must judge the value and efficacy of the indicators presented to them. Quantitative indicators, for example, may measure quality if value is embedded in them. Without embedded value, however raw numbers are meaningless as a measure of quality. Narrative reports by stakeholders and project directors are important indicators of quality, which are subject to critical review by the evaluators for credibility and the strength of argument and supportive documentation.

Issue: A matter of public or professional concern or interest. An issue often provides the motivation for initiating an outreach project. *Points of Distinction* avoids the term "problem" wherever possible. *Points of Distinction* does not view outreach as fundamentally a "problem-solving" exercise. While an issue may be viewed as a problem by the stakeholders, filling a need or responding to an opportunity to enhance the quality of life may better describe the goal of an outreach project.

Multidisciplinary Approach: See Cross-Disciplinary Approach

Outcome: See Impact

Outreach: *Points of Distinction* uses the definition of outreach that appeared in *University Outreach at Michigan State University: Extending Knowledge to Serve Society (*October 1993, p. 1:) "A form of scholarship that cuts across teaching, research, and service. Outreach involves generating, transmitting, applying, and preserving knowledge for the direct benefit of external audiences in ways that are consistent with university and unit missions". (Please note, however, the discussion of "audience" under "stakeholder.")

Partner: See Stakeholder

Partnership: See Project

Project: The general term used to designate any one of the variety of outreach activities undertaken by the university. These include lecture series, off-campus courses, broad-service partnerships, community interventions with specific goals in mind, extended consulting arrangements, etc. A project can be a set of activities sponsored by on individual; it can also consist of a number of activities that serve a common purpose and are overseen by a common leadership group. As the basis of outreach evaluation in this guidebook, the project should be sufficiently significant to merit evaluation but not so complex that the evaluation results are of little practical use to participants. Projects involve planning, consultation, implementation, a set of desired outcomes, and evaluation. When encountering the term "project," interpret the surrounding discussion to refer to the specific type of outreach activity that is being planned or evaluated.

Scholarship: Scholarship is a term of the academy. Similar activities in the community may go by other names. Scholarship is the thoughtful discovery, transmission, and application of knowledge. Within higher education, the activity is based in the ideas and methods of recognized disciplines, professions and interdisciplinary fields. Scholarship is deeply informed by the most recent knowledge in the field and carried out with intelligent openness to new information, debate and criticism. If it is to be recognized, utilized, and rewarded, it goes without saying that scholarly activity must be shared with receptive groups in appropriate ways. Publication in scholarly journals or by respected presses, or presentation at professional forums are the traditional means of dissemination in the disciplines and professions. However, these may not be the most appropriate or the only means of sharing scholarship in an outreach context. Active presentation or utilization in practice, the reflection of scholarly findings in public policy, appearance of results in the media, electronic reporting of results on the World Wide Web, the updating of syllabi, and so forth, may better reach those nonacademic groups for whom the scholarship is most useful or who have been co-engaged in generating it. The quality of scholarly activity, as valued by the academy, may be measured by qualified professionals regardless of the form taken by its dissemination. In addition, evaluators should consider how the scholarly activity has been shared and the extent to which that communication has effectively reached those potentially affected by its findings.

Significance: A fundamental characteristic and qualitative measure of an outreach project. The relative significance of a project is a critical factor in the initial decision whether or not to invest scarce resources to address it. In an era of increasing demand and expanding responsibilities for university faculty, the significance of out activities must be reexamined. Significance is often an matter of perception and affirmed through persuasive argument. Is the issue found in current public, political, or professional discourse, in the media? What documentation support the urgency with which the issue should be addressed? Is the issue found in a unit's list of priorities?

Stakeholder: The general term used designate all external and internal individuals or groups who care about the project, who have an interest in seeing that it succeeds. The term implies consultation, that the stakeholders have had some input in project design, implementation, evaluation. Thus it is stronger that the more neutral term, "constituent." All stakeholders may not have equal responsibility for the project or share fully in its design, but usually some financial or resource contribution to the project has been made. They have bought in to the project in a meaningful way. *Points of Distinction* tries to avoid the terms "audience"and "target audience" since they imply passive receiving of goods and services, those for whom a project is intended, the primary beneficiaries. A "partner" is a type of stakeholder who is actively associating on an equal footing with other groups. Partners share central responsibilities for the project. The disadvantage in using this term is that it tends to depersonalize and set a business or goal-orientation tone to the outreach project.

Target Audience: See Stakeholder

Unit: An academic department, school, institute, center or similar structural organization with administrative leadership and stated goals and objectives (the mission).